Press Release

Christopher Calandra and Lindy Brock attended a special training session for financial advisors from May 17 – May 18, 2018. This session, hosted by ***The Academy of Preferred Financial Advisors***, consisted of a strong mix of practice management, client service training and tax planning information that was shared by highly-respected industry professionals with a combined experience of over 90 years specializing in assisting financial practitioners better manage tax, estate, investing, retirement and protection planning and other issues that affect high net-worth investors. Christopher Calandra is part of a select number of individuals who are members of The Academy of Preferred Financial Advisors' Exclusive Coaching Program.

The session was led by Academy Founder Ken Unger, a highly-respected financial advisor coach with over 35 years of industry experience. Members also received tax planning training from Robert Keebler CPA, PFS, MST and AEP (Distinguished) and client relations and services training from Tom Gau, CFP®, CPA (a former Barron's Top 100 and #1 Advisor in his state for over 10 years).

The time that Christopher Calandra spent at this session was focused how the advisors and their offices can excel at client satisfaction, increase office efficiency and effectiveness, and improve and expand the services they offer to their clients. Christopher Calandra left this special training session with a renewed dedication to the practice and the commitment to offer the highest level of financial services.

Ken Unger and Thomas B. Gau are not affiliated with *SagePoint Financial, Inc., member FINRA/SIPC*
